



***Suburban
Software
Systems***

MANAGEMENT REPORTS

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Management Reports Menu:



Allows the user to produce reports which will help management analyze trends in gas usage, customer losses or gains by driver or zone, and where the individual customer's gains or losses are

Analysis Reports

Delivery Analysis:

Delivery Analysis Report

Company Identification Code SPI ▾

Branch Name --or- ALL Branches 01 - Your Comp. ▾

Select The Customers To Be Printed All ▾

Select Type of Report (Detailed, EOM, Summary) Detailed ▾

For Summary Reports - Select Summary By Driver or Route Driver ▾

Beginning with Driver and Route

Ending with Driver and Route

Number of Copies to Print 1

Form Name 0001 ▾

Printer Type P1 - Oki Data Dot ▾

Exit Continue

Notes:

- Reports may be produced for all accounts or by specific account types such as co-tank, industrial, budget, meter, or inactive.
- A report may be produced as a “summary” report or “detailed” listing of each account.
- If a summary report is requested, the report may be summarized by driver or delivery zone.

Salesman's Monthly Production:

The screenshot shows a blue window titled "Salesman Monthly Production Reports". It contains several fields with dropdown menus:

- Company Identification Code: WEB
- Beginning Month and Year: 02/20
- Ending Month and Year: 02/20
- Which Report do you want? A Summary by: "Day", by "Driver" or "Both": DRIVER
- Form Name: 0000
- Printer Type: VW

At the bottom of the window, there are two buttons: "Exit" on the left and "Continue" on the right.

This report provides summarized total sales from gas related transactions. Separate totals are printed for delivered and no-delivered gallons sold.

Budget Billing:

The screenshot shows a software interface for a 'Budget Billing Report'. It features a blue background with white text and input fields. The fields are as follows:

- Company Identification Code: WEB (dropdown)
- Branch Name -or- ALL Branches: All Branches (dropdown)
- Select The Customers To Be Printed: Budget (dropdown)
- Price Adjustment From Base (x.xx): 0.00 (text input)
- Select Increase (I) or Decrease (D): Increase (dropdown)
- Billing Cycle (Select Cycle Number and Fixed or Variable): (dropdown) (dropdown)
- Minimum Budget Rate to Print (Required Entry as a Whole Dollar Amount): 00 (text input)
- Maximum Budget Rate to Print (Required Entry as a Whole Dollar Amount): 999 (text input)
- Minimum Allowable Delivery Confidence Factor: (text input) %
- Update Master Files with New Budget Rates? Y/N: N - No (dropdown)
- Add to "Forecasted Gallons" the Number Of Gallons Required to Fill? Y/N: N - No (dropdown)
- Form Name: 0000 (dropdown)
- Printer Type: VW (dropdown)

At the bottom, there are two buttons: 'Exit' on the left and 'Continue' on the right.

Allows the user to compute a recommended "Budget Billing Rate" based on the customer's gas use rates and the variables inserted related to the price,

Allows the user to produce a list of recommended Budget Rates

Budget Rate Calculations: For each customer that meets the "Confidence Factor" criteria you specify, the program evaluates "YTD Gas", "Last Year's Gas" and a one year "Forecast Gas Usage". It selects the highest of these usages to compute an annual gas bill based on the gas price you select. Existing account balances, and rent charges are added. After subtracting any expected payment, the total is divided be 12 to determine recommended monthly budget rate.

Notes:

- The program only recommends a budget rate. This rate should be reviewed carefully to determine if it is appropriate. Special attention should be given to closeness between "Last Year's Gas" and "Forecast Gas". If the two usages are close, then the recommended budget rate is probably a good estimate.
- It is recommended that the Budget Report should be printed at least quarterly and whenever there is a significant change in the price of gas or weather.

Budget Billing Options:

- Company Id (CoID)** Enter your Company ID

- Branch Name/ ALL** Enter a Branch Name or “ALL” for all branches.

- All or Budget Customers:** For the Branch you specify, the program will update every account that meets the “confidence factor” with a “Recommended Budget Rate” but the printout can be restricted to just the existing Budget Customers or list “ALL” accounts.

- Price Adjustment from Base:** Price that the program will use to compute budget rates

- Increase/ Decrease:** Used when estimating price fluctuations up/ down throughout the year.

- Min/Max Budget Rates:** Some customers may use too little or too much gas to be considered for Budget Billing. You may restrict those accounts by selecting Minimum and Maximum Budget Rates to be updated in the customer’s file. Listed in Whole dollar amounts.

- Update Master File:** Select {Y} for yes or {N} no to update the Master File with new Budget Rates.

- Add “Forecasted Gallons”:** Enter {Y} for yes or {N} for to add “Forecasted Gallons to the number of gallons required to fill

Master Billing Accounts:

Master Billing Account Report

Company Identification Code SPI ▾

Branch Name -or- ALL Branches 01 - Your Compar ▾

Number of Copies 1 ▾

Form Name 0000 ▾

Printer Type P1 - Oki Data Dot ▾

Exit Continue

Allows the user to setup and maintain delivery information on multiple subsidiary accounts, while having the charges and payments transferred to a single Master billing Account (MBA).

Notes:

- The Master Billing Report produces a list of the designated Master Billing Accounts and the accounts that have been assigned to them.
- To setup MBA subsidiary accounts refer to the Master File in the Daily Menu section of the manual.

Gas Usage vs Price:

The screenshot shows a software window titled "Gas Usage / Price Report" with a blue background. It contains several fields and dropdown menus:

- Company Identification Code: SPI
- Branch Name -or- Company ID for all branches: 01 - Your Compar
- Enter "Type Customer" to Print (optional):
- Master File Special Product Code (or blank for all):
- Price Class (or blank for all):
- Revise or Review Gas Requirements Table? Y/N: Y - Yes
- Update Master Files with New Price Class Changes? Y/N: N - No
- Number of Copies: 1
- Form Name: 0000
- Printer Type: 1 - Oki Data Dot

At the bottom of the window, there are two buttons: "Exit" on the left and "Continue" on the right.

This report will help dealers assign appropriate price codes to clients. It will also show customer's gas use, current price class (if assigned), and a recommended price class based on gas use.

Note: To run this report, a gas price table must be setup. This defines the quantities at which customers qualify for each price class.

Gas Usage/ Price Report Fields:

Customer ID	Enter the Customer ID (CoID)
Branch/ Company Id	Enter the branch name or enter the company identification code to run the report for all branches.
Type Customer:	Enter a type customer code to print the report for customers with a specific type code entered in the customer master file. Leave this field blank if no “type code” selection is desired.
Master File Special Product Code:	Enter a Product Code to print the report for customers with a specific product code in the Master File. Leave this field blank if no “product code” selection is desired.
Price Class:	Enter a price class code to print the report for customers with a specific price class code in the Master File. Leave this field blank if no “price class” selection is desired.
Revise or Review Gas Table:	Enter {Y} to change the gas table or to initially create the gas table or enter {N} if no change is necessary.
Update Master File:	Enter {Y} to update the Master File with new price changes or enter {N} if no update is necessary.
Form Name:	Enter what for you want the report to be printed on.
Copies:	How many copies do you need
Printer ID	Enter the appropriate printer identification code or view to view without printing.

Screen Two:

If the option to review or revise the gas table is selected with {Y} this screen will pop up.

Price Class	Minimum Bulk Gallons	Minimum Cylinder Gallons
1.	0	0
2.	0	0
3.	0	0
4.	0	0
5.	0	0
6.	0	0
7.	0	0
8.	0	0
9.	0	0

Price Class: Up to nine price class groups may be established in the Suburban Software Propane System. The price class column lists the price codes 1 through 9 for reference. No entry is required in this column.

Minimum Bulk Gallons: Enter the number of "Bulk" gallons that a customer must purchase to qualify for the corresponding price class in the price class column (1 through 9). All entries to this column must be in whole gallons (no decimal) and must be ascending.

Minimum Cylinder Gallons: Enter the number of "Cylinder" gallons that a customer must purchase to qualify for the corresponding price class in the price class column (1 through 9). All entries to this column must be in whole gallons (no decimal) and must be ascending.

Prepaid Contract Gas:

The screenshot shows a software window titled "Contract Gas Listing" with a blue background. It contains several input fields and dropdown menus:

- Company Identification Code**: A dropdown menu with "SPI" selected.
- Branch Name -or- Company I.D. for all branches**: A dropdown menu with "01 - Your Compa" selected.
- Enter "Product Code" to print**: An empty dropdown menu.
- "Driver" and/or "Route" to print**: Two empty text boxes with "(Blank for all)" to their right.
- Tank Inventory in Percent Full or Less**: An empty text box.
- List Option**: A dropdown menu with "ACTIVE" selected.
- Form Number**: A dropdown menu with "0001" selected.
- Printer Type**: A dropdown menu with "P1 - Oki Data Dot" selected, with "(P1, P2, etc.) - or - (View = VW)" to its left.

At the bottom of the window, there are two buttons: "Exit" on the left and "Continue" on the right.

Generates a list of customers who have pre-buy gas.

Transaction Deviation Report:

The screenshot shows a blue window titled "Deviation Report". It contains several input fields and dropdown menus:

- Company Identification Code**: A dropdown menu with "SPI" selected.
- Enter Sales Month and Year of Report**: A text input field with "(MM/YY)" as a placeholder and a light blue selection box.
- Enter Sales Journal Run Number of original report**: A text input field.
- Report**: A dropdown menu with "DETAILS" selected and the text "('Details' or 'Errors')" next to it.
- Form Name**: A dropdown menu with "0001" selected.
- Printer Type**: A dropdown menu with "P1 - Oki Data Dot" selected.

At the bottom of the window, there are two buttons: "Exit" on the left and "Continue" on the right.

This report can be printed to determine gas sold above/below prices entered in the price file.

Note:

- Allows user to choose a "Details" report or an "Error" report.
- Based on run numbers on each posting.

PPS Delivery Tracking:

Vehicle Route Tracking By Date

Company Identification Code SPI

Truck Number

Date of Deliveries To Be Mapped

Exit Continue

Allows the operator to track the locations of where the trucks have been on certain days.

Report Generators:

Customer Report Generator:

Customer Report Generator

Company Identification Code	SPI
Branch Name -or- ALL Branches	01 - Your Comp.
Detailed or Summary Report	Detailed
Output Format	1 = Customer Status
Database File Name To Create	
Output To Map?	N - No
Print Addresses and Directions?	N - No
Single or Double Spacing?	1=Single
Form Name	0001
Printer Type	P1 - Oki Data Dot

Exit Previous Screen Continue

Allows the user to produce a detailed or summary customer report based on the criteria specified in the different screens provided.

Screen One Fields:

Company Id	Enter the Company Id (CoID)
Branch	Enter the Branch Number/ All for all Branches.
Type of Report:	Detailed: If a detailed output is desired, account numbers and customers' names will show on the report. Summary: If a summary output is desired, account numbers and customers' will not show on the report.
Output Format:	<ol style="list-style-type: none">1. if you want the report to print out in customer status format2. if you want the report to print out in delivery analysis format3. If you want the report to print out in database format.
Database File Name to Create:	Enter the name that you want the file to be called.
Output to Map?:	Enter {Y} if you want to output to Map or {N} if you want
Print Memos?:	Customer memos may be added to the report by entering "Y" in this field.
Addresses and Directions?:	Enter "Y" if you want to include addresses and directions to the report.
Single/ Double Spacing	Enter {1} for single spaced report or {2} for double spaced report.
Form Name:	Enter what for you want the report to be printed on.
Printer ID	Enter the appropriate printer identification code or view to view without printing.

Screen Two:

Customer Report Generator 2/4

FIELD NAME (EQ, NE, GT, GE, LT, LE)

Select All, Balance, Budget, Credit, CoTank, PastDue, Meter, or Runout Customers All ▾

Type Customer Code 1 and 2

Credit Code(s)

Tax Code

Product Code

Price Class Code (1-9) ▾

Finance Charge Code ▾

Statement Code (S, I, J, N, R) ▾

Customer Balance (7.2) ▾

Customer Past Due Balance (7.2) ▾

Payment Date (MMDDYY) ▾

Budget Rate (5.2) ▾

Deposit Amount (7.2) ▾

The following options are available for the customer report:

ALL, BALANCE, BUDGET, CREDIT, COTANK, PASTDUE, METER, OR RUNOUT

The options shown in this screen will allow the customer report to be printed for all, balance-only, budget or credit customers; customers with a past due balance, customers with company owned tanks, customers with metered tanks, or customers who have run out of gas.

The other options in the second prompt screen allow the user to select specific customers to print on the report by type customer, type customer 2 (second field in customer master file), credit code, tax code, product code, price class code, finance charge code or statement code.

To selectively print accounts with blank product codes or a blank type customer code enter a single forward slash {/} in the field.

The third part of this screen allows the operator to customize the report by using the following codes:

- EQ** Equal
- NE** Not Equal
- GT** Greater Than
- GE** Greater or Equal
- LT** Less Than
- LE** Less or Equal

The first column lists all the different options the operator has to customize the report; specify the appropriate code in the second column and enter an appropriate value in the third column.

Example: Customer Balance.....(7.2) **EQ** **50000**

The report will print all customers with a balance that equals \$ 500.00

Screen Three:

Customer Report Generator 3/4

FIELD NAME	(EQ, NE, GT, GE, LT, LE)
Credit Limit Amount (5.0)	<input type="text"/>
Start Date (MMYY)	<input type="text"/>
Zip Code (5.0)	<input type="text"/>
Driver Number	<input type="text"/>
Route Code	<input type="text"/>
Company Tank Status Code	<input type="text"/>
Delivery Code	<input type="text"/>
Tank Size (5.0)	<input type="text"/>
Percent Full (2.0)	<input type="text"/>
Delivery Date (MMDDYY)	<input type="text"/>
Gas Check Date (MMYY)	<input type="text"/>
Use Code	<input type="text"/>
Year To Date Gallons (6.1)	<input type="text"/>

Enter the desired codes and values in the appropriate fields and click continue. Driver Number, Route Code, Company Tank Status Code, and Delivery Code are defaulted to EQ.

Screen Four:

Customer Report Generator 4/4

FIELD NAME	(EQ, NE, GT, GE, LT, LE)
Last Year Gallons Purchased (6.1)	<input type="text"/> <input type="text"/>
Gallons Per Day (2.1)	<input type="text"/> <input type="text"/>
Gallons Per Degree Day	<input type="text"/> <input type="text"/>
Gallons Per Day Confidence Level	<input type="text"/> <input type="text"/> %
Gallons Per Degree Day Confidence Level	<input type="text"/> <input type="text"/> %
Salesman Code	<input type="text"/>
Billing Cycle	<input type="text"/>
Electronic Tank Monitor (ETM) Vendor	<input type="text"/>

Exit Previous Screen Continue

Enter the desired codes and values for the appropriate fields and click continue.

This is the last screen to input values and codes. The report will be generated after this.

Tank Report Generator:

Screen One:

The screenshot shows a software interface titled "Tank Report Generator" with a blue background. It contains several dropdown menus and buttons. The fields are as follows:

Field	Value
Company Identification Code	SPI
Branch Name -or- ALL Branches	01 - Your Compa
Print Tanks, Cylinders or Equipment	Tanks
Output as a Tank File Report or as a Tab Delimited File (for Excel)	1 = Tank File Report
Tab Delimited File Name To Create	
Print Rented Tanks or Cylinders?	Y - Yes
Print Yard Tanks or Cylinders?	Y - Yes
Print Loaned Tanks or Cylinders?	Y - Yes
Print Metered Tanks or Cylinders?	Y - Yes
Print Inactive Tanks or Cylinders?	Y - Yes
Customer Owned Tanks or Cylinders?	Y - Yes
Print Sold Tanks or Cylinders?	N - No
Print Deleted Tanks or Cylinders?	N - No
Form Name	0001
Printer Type	VW - View

At the bottom of the screen, there are three buttons: "Exit", "Previous Screen", and "Continue".

Allows the user to produce a detailed/ summary tank/cylinder report based on the criteria specified in the different screens provided.

Notes:

- This screen allows the operator to select if he wants a cylinder, tank or a cylinder and tank report and which tanks or cylinders will appear on the report:
 - Rented
 - In Yard
 - Loaned
 - Sold
 - Metered
 - Inactive
 - Deleted
- Database File allows user to assign a name to the report to be opened in excel

Click {Continue} to go to next screen.

Screen Two:

Tank Report Generator 2/3

Print All Tanks or Cylinders With: (EQ, NE, GT, GE, LT, LE)

Size (5.0)

Rental Equipment Product Code

Rental Amount (7.2)

When Due Code

Gallons Used Since Billing (7.1)

Lease On File (Y/N)

Above or Underground (A/U)

Tank Location Tax Code

Manufactured By

Fill in the fields with the appropriate code and value to customize your report, please note that some options are system defaulted to code EQ (equal).

Screen Three:

Tank Report Generator 3/3

Print All Tanks or Cylinders With: (EQ, NE, GT, GE, LT, LE)

Date Last Moved (MMYY)	<input type="text"/>	<input type="text"/>
Date Last Painted (MMYY)	<input type="text"/>	<input type="text"/>
Purchase Date (MMYY)	<input type="text"/>	<input type="text"/>
Date Built (MMYY)	<input type="text"/>	<input type="text"/>
External Inspection Date (MMYY)	<input type="text"/>	<input type="text"/>
Regulator Inspection Date (MMYY)	<input type="text"/>	<input type="text"/>
Anode Inspection Date (MMYY)	<input type="text"/>	<input type="text"/>
Pressure Tested Date (MMYY)	<input type="text"/>	<input type="text"/>
Pressure Relief Valve Date (MMYY)	<input type="text"/>	<input type="text"/>
Relief Valve Testing Date (MMYY)	<input type="text"/>	<input type="text"/>

A report will be generated after this screen.

Report Example:

Page - 1		9/02/15		Tank File Listing							
Serial #	T/C	Br-Acct	Tank Name	Relief Valve	TC	Size	Rent/Dte	Built	Purch	Moved	Paint
Inspect	Regulr	Anode	Press	Valve	Test						
C 2093086	T	1-72676	STIERLY PATSY		PA	120					
L 00158036	T	1-77030	JOHN ROCK INC		99	13				05/10	
L 00158306	T	1-77030	JOHN ROCK INC		99	13				05/10	
L 00158324	T	1-77030	JOHN ROCK INC		99	13				05/10	
L 002066	T	1-00319	UNITED SPORTS TRAINING		PA	120				08/13	
L 002253	T	1-00686	JACKSON, VIRGINIA		PA	120				03/14	
L 00521988	T	1-38578	ELLIS, BRIAN & JAMALYN		PA	1000				08/13	
			09/13								
L 01013665	T	1-99265	MURDOCK, JEFF & DEBBIE		PA	120				02/13	
L 03334205	T	1-77030	JOHN ROCK INC		99	10				05/10	
L 03334207	T	1-77030	JOHN ROCK INC		99	10				05/10	
L 03334209	T	1-77030	JOHN ROCK INC		99	10				05/10	
L 03334210	T	1-77030	JOHN ROCK INC		99	10				05/10	
L 03334211	T	1-77030	JOHN ROCK INC		99	10				05/10	
L 03334215	T	1-77030	JOHN ROCK INC		99	10				05/10	
L 03334217	T	1-77030	JOHN ROCK INC		99	10				05/10	

Transaction Report Generator:

The screenshot shows a blue window titled "Transaction Report Generator". It contains several input fields and dropdown menus:

- Company Identification Code**: A dropdown menu with "SPI" selected.
- Beginning Month and Year**: Two empty text input fields.
- Ending Month and Year**: Two empty text input fields.
- Detailed Report, Summary Report or Tab Delimited File Output (for Excel)**: A dropdown menu with "DETAIL" selected.
- Printer Type**: A dropdown menu with "P1 - Oki Data Dot" selected.

At the bottom of the window, there are three buttons: "Exit", "Previous Screen", and "Continue".

The transaction report generator gives the operator the ability to have the system search thru a transaction file and to print all the records it finds that match any search argument you enter.

Notes:

- Enter the month/year you want the report to begin and end in.
- Enter what kind of report you want generated:
 - **Detailed:** Account numbers and Customer names will show.
 - **Summary:** Account numbers and Customer names will not show.
 - **File Output:** Allows you assign a file name in order to export report to Excel.

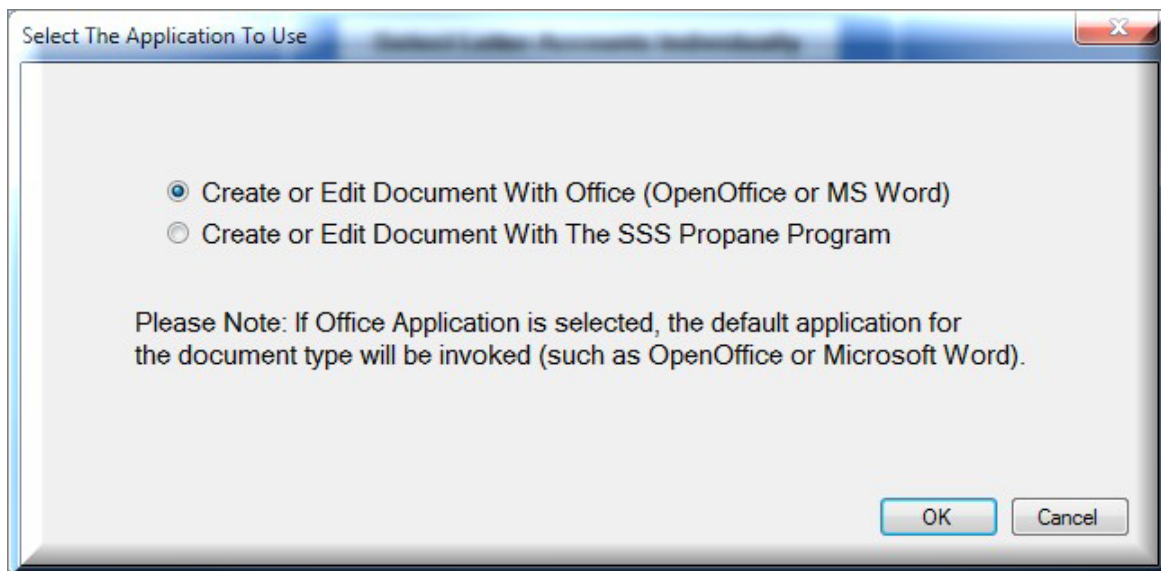
Letter Production Menu:



This allows the user to:

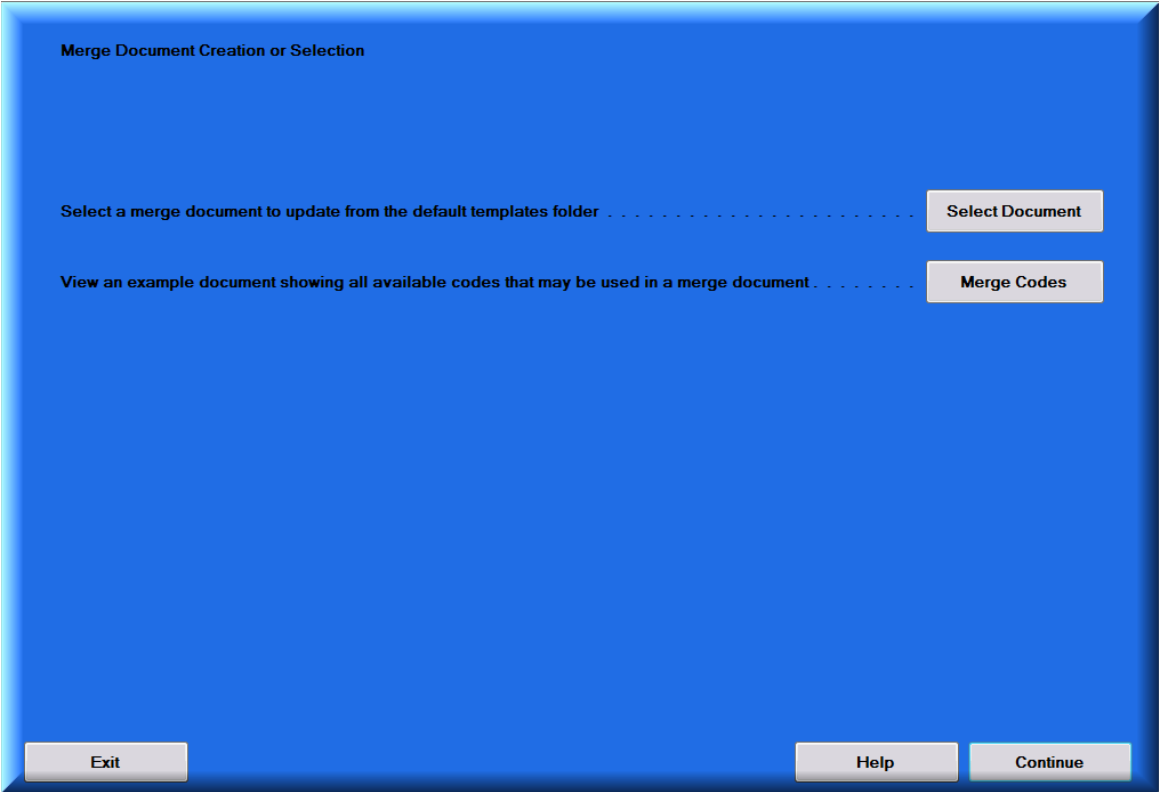
- Create or modify either Suburban Legacy letters or External Application Documents such as Microsoft Word.
- Select who is to receive Sales Letters either individually by account or globally.
- Deselect accounts not receive letters.
- Print and or EMAIL Sales letters.

Create Letter Document:



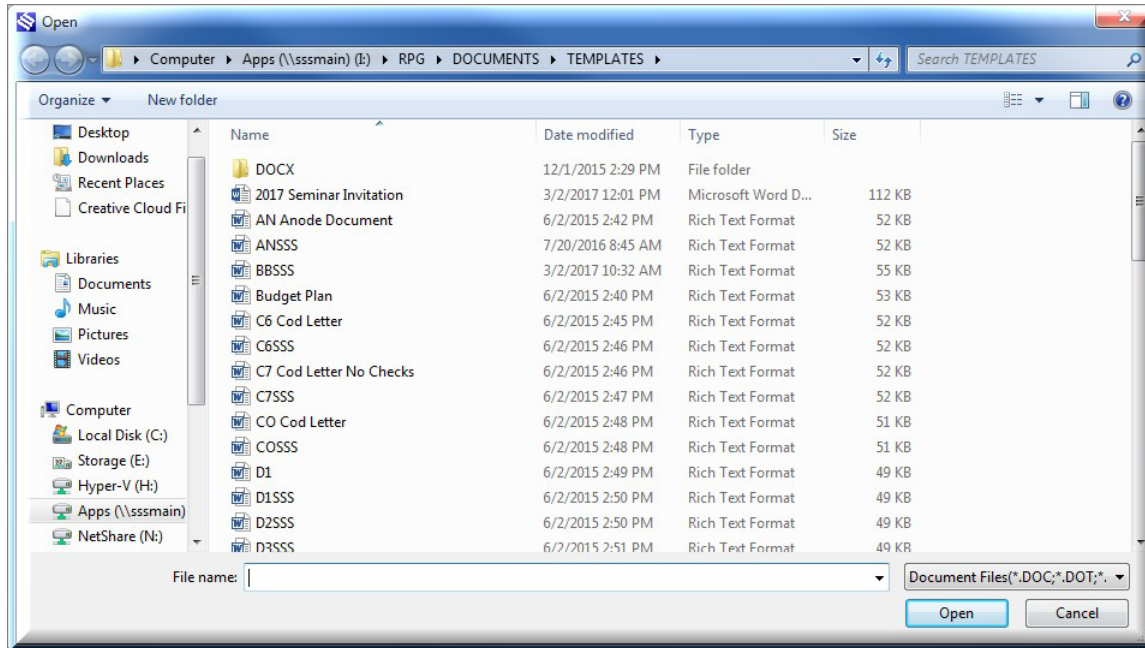
Allows the user to choose between creating and editing a document through an external application such as Microsoft Word or through Suburban.

Creating/ Editing Document Using External Application:



- Allows the user to select which letter is to be written or modified from existing examples.
- Shows the available “SSS Merge Codes” that can be integrated into any document.

Select Document:



Allows the user to select from existing letter document templates or add a new document template.

Merge Codes:

Click on Merge Code Document to get a list of all merge codes that can be placed in the External Sourced Letter.

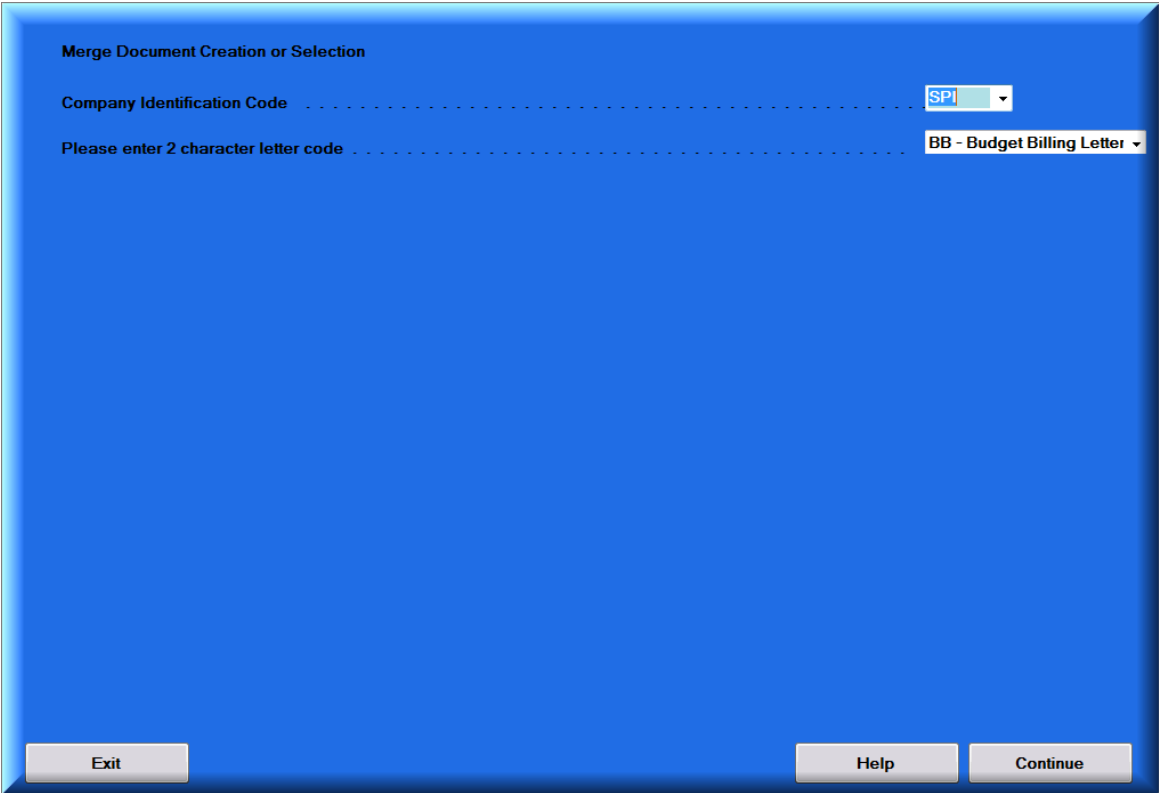
The merge codes below must be placed into the external source document (Word, Excel, etc.) **Exactly** as shown below including the brackets in order to merge Data.

SSS Merge Codes

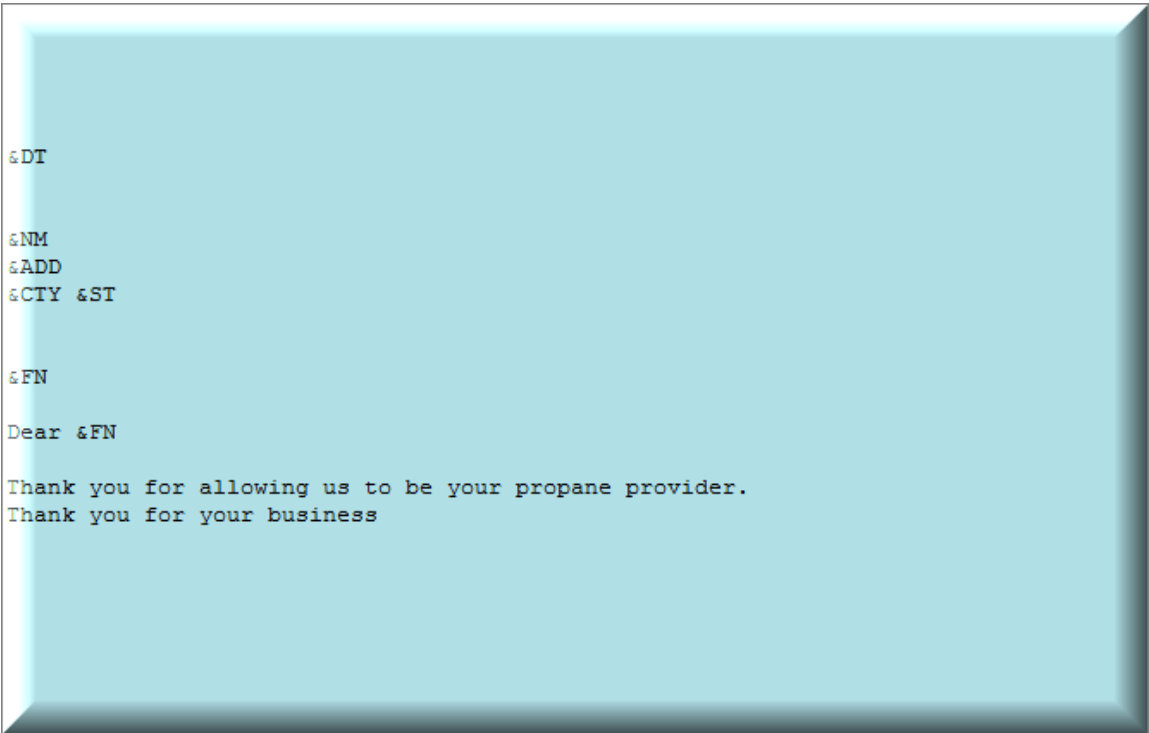
The following codes may be used in a Word Document when merging with SSS Letter Writing Features.

[COID]	[TANKSERIAL]
[STATUS]	[TANKTYPE]
[ACCOUNT#]	[TANKUI]
[COMPANYTANK]	[LOCKCODE]
[FULLNAME]	[TANKSIZE]
[LASTNAME]	[NROFTANKS]
[MIDDLEINIT]	[GAL/DD]
[FIRSTNAME]	[GAL/DAY]
[CAREOF]	[LASTDELIVERYDATE]
[STREET]	[PREVIOUSFILLPCT]
[CITY]	[FORECASTEDPCTFULL]
[ST]	[GASCHECKDATE]
[ZIPCODE]	[YTDELIVERIES]
[ZIP4]	[YTDGAS]
[AREA]	[LASTYRGAS]
[PHONE]	[LASTDELIVEREDGAS]
[TAXCD]	[DELIVERYSTREET]
[CREDITCD]	[DELIVERYTOWN]
[TYPECUSTOMER]	[DELIVERYSTATE]
[FINCHG]	[DELIVERYZIP]
[STATEMENT/INVOICE]	[TAXID]
[OPENITEM/BALFWD]	[MASTERBILLACCTNR]
[PRICECLASS]	[LATITUDE]
[TERMS]	[NORTH]
[PRODUCTCODE]	[LONGITUDE]
[DESCRIPTION]	[WEST]
[UI]	[STANDINGPO]
[TYPE2]	[PHONETYPE2]
[BALANCE]	[PHONE2]
[CURRENT]	[PHONETYPE3]
[OVER30]	[PHONE3]
[OVER60]	[EMAILADDRESS]
[OVER90]	[ELETTER]
[OVER120]	[EPOSTCARD]
[PASTDUE]	[ESTATEMENT]
[PREVSTAMTBALANCE]	[EINVOICE]
[DEPOSIT]	[GAINCODE]
[RECEIPTDATE]	[GAINDATE]
[RECEIPTAMOUNT]	[LOSTCODE]
[BUDGETRATE]	[LOSTDATE]
[BUDGETBALANCE]	[SALESMAN]
[RECOMMENDEDBUDGETRATE]	[DIRECTIONS]
[STARTDATE]	[DIRECTLINE2]
[CREDITLIMIT]	[DIRECTLINE3]
[DELIVERYCODE]	[DIRECTLINE4]
[USECODE]	[DIRECTLINE5]
[DRIVER]	[CURRENTPRICE]
[ROUTE]	[PAYBYDATE]
[SEQUENCE]	

Create or Edit Document with SSS Propane Program:



Allows the user to edit a letter within Suburban.



Select Customers Individually:

SELECT CUSTOMER'S INDIVIDUALLY

Company Identification Code SPI

Branch and Account Number 01 F5-Search

Account: Status: Credit Code Current
Name Delivery Over 30
Address Tax Code Over 60
City/State Fin Chg Over 90
Zip Code Cust Type Over 120
Phone Total

Letter Number BB - BUDGET BILLING LETT

Exit Previous Screen Continue

Allows the user to choose specific accounts that the letter is to be sent.

Note:

- Choose what type of letter is to be sent by the 2 Character Letter Number.
- If the Letter Code does not exist for the letter you have created, you can add it by going to the following: **Utility Menu > User Defined Fields > Sales Letter Codes**

Select and List Accounts Globally:

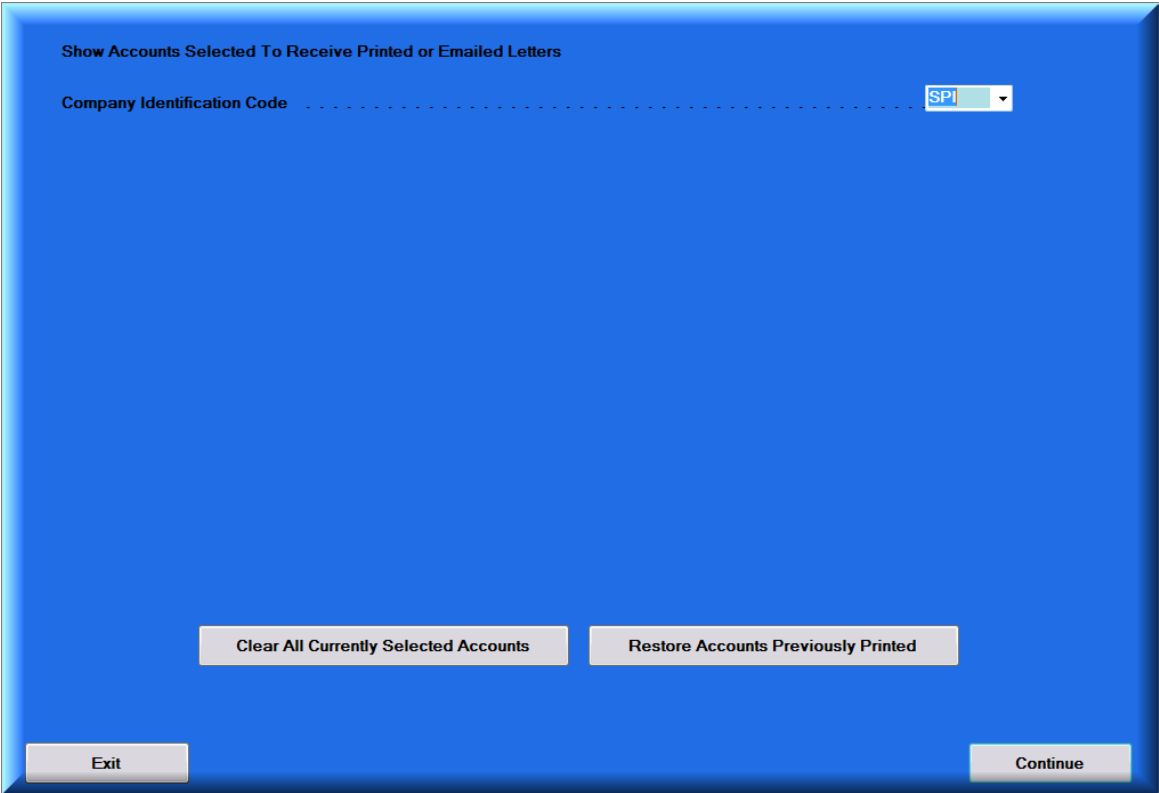
The letter can be selected by individual account number one account at a time, or they can be selected by group based on the options below.

The screenshot shows a software window titled "Select and List Letters Automatically" with a blue background. It contains several input fields and dropdown menus:

- Company Identification Code**: A dropdown menu with "SPI" selected.
- Branch Name -or- ALL Branches**: A dropdown menu with "01 - Your Comp." selected.
- Letter Code**: A dropdown menu with "BB - Budget Billing Letter" selected. A red arrow points to this field.
- Which Accounts? (Balance, All, Active, Budget, NonBudgt, CoTank, Meter)**: A dropdown menu with "Balance" selected.
- Enter "Type Customer" To Print**: Two small square checkboxes.
- Enter Master File "Product Code" To Print**: A dropdown menu.
- Driver and/or Route**: Two small square checkboxes.
- Select Customers with "Credit Codes" Equal**: Four small square checkboxes.
- Select Customers with "Delivery Codes" Equal To**: Four small square checkboxes.

At the bottom of the window, there are two buttons: "Exit" on the left and "Continue" on the right.

Remove Accounts from Selected List:



Once the accounts are chosen, enter the Remove Accounts From Selected List option and do a final review all the accounts there that were picked individually or selected as a group and de-select any that you do not want to send a letter to.

Proceed with the Final Step to Print Letters. This will merge data requested in the External Letter and print out letters to be mailed.

Print Letters:

Print And/Or Email Sales or Promotional Letters

Company Identification Code WEB ▾

Branch Name -or- ALL Branches 01 - Green's Prc ▾

Select File Type of Document to Print or Email
The PDF option merges data with a preformatted MS Word or Open Office Merge file.
 Text (Legacy)
 Adobe PDF

Letter Code to Print BB - Budget Billing Letter ▾

Letter Date 08/03/22

Due By Date

Output in Zip Code Sequence? N - No ▾

Configure Company Email Settings EMail Details (Subject, Body, BCC) Select Document Letter File(s)

Exit Continue

Allows the user to print selected letters.

Notes:

- The PDF option merges data with a preformatted MS Word or Open Office Merge file
- Allows you to BCC (Blind Carbon Copy). This is used only for E-letters. Leave blank if not needed.

Print Labels:

The screenshot shows a 'Label Printing' dialog box with a blue background. It contains several input fields and buttons:

- Company Identification Code**: WEB (dropdown)
- Branch Name -or- Company I.D. for all branches**: 01 - Green's Proj (dropdown)
- Which: (BALANCE, ALL, ACTIVE, BUDGET, NONBUDGT, COTANK, METER, DELQLETR)**: All (dropdown)
- Enter "Type Customer" to print**: Type 2:
- Enter Master File "Product Code" to print**:
- "Driver" and/or "Route" to print: (Blank for all)**:
- Enter "Credit Codes" to print**:
- Enter "Delivery Codes" to print**:
- Output in Zip Code sequence?**: N - No (dropdown)
- Print Account Number?**: Y - Yes (dropdown)
- Form Name**: Avery 5160 Labels 3UP (dropdown)
- Printer Type:**: P1 (dropdown)

At the bottom, there are two buttons: **Exit** on the left and **Continue** on the right.

Allows you to print labels for letters

Configure Email Settings:

See E Bill Setup

The screenshot shows a software interface with a blue background. On the left, there are labels for "Email Settings" and "Company Identification Code". On the right, there is a dropdown menu showing "WEB". In the center, a dialog box titled "SMTP Settings" is open. The dialog box has two main sections: "Email Settings" and "Email Testing".

Email Settings

- Company Id: WEB
- Branch Number: 1
- SMTP Server: [Empty text box]
- SMTP Port: [Empty dropdown menu]
- Authentication Type: None
- Server Requires Authentication
- SMTP Username: [Empty text box]
- SMTP Password: [Empty text box]

Email Testing

These settings are for testing only.

- FROM Email Address: dotnet@suburbansoftware.com
- TO Email Address: dotnet@suburbansoftware.com
- Enable Detailed SMTP Logging
- Send Test Email

At the bottom of the dialog box are "Exit" and "Save" buttons. At the bottom of the main application window are "Exit" and "Continue" buttons.